

# **INTEGRATED BUDGET INFORMATION SYSTEM (IBIS) USER GUIDE**

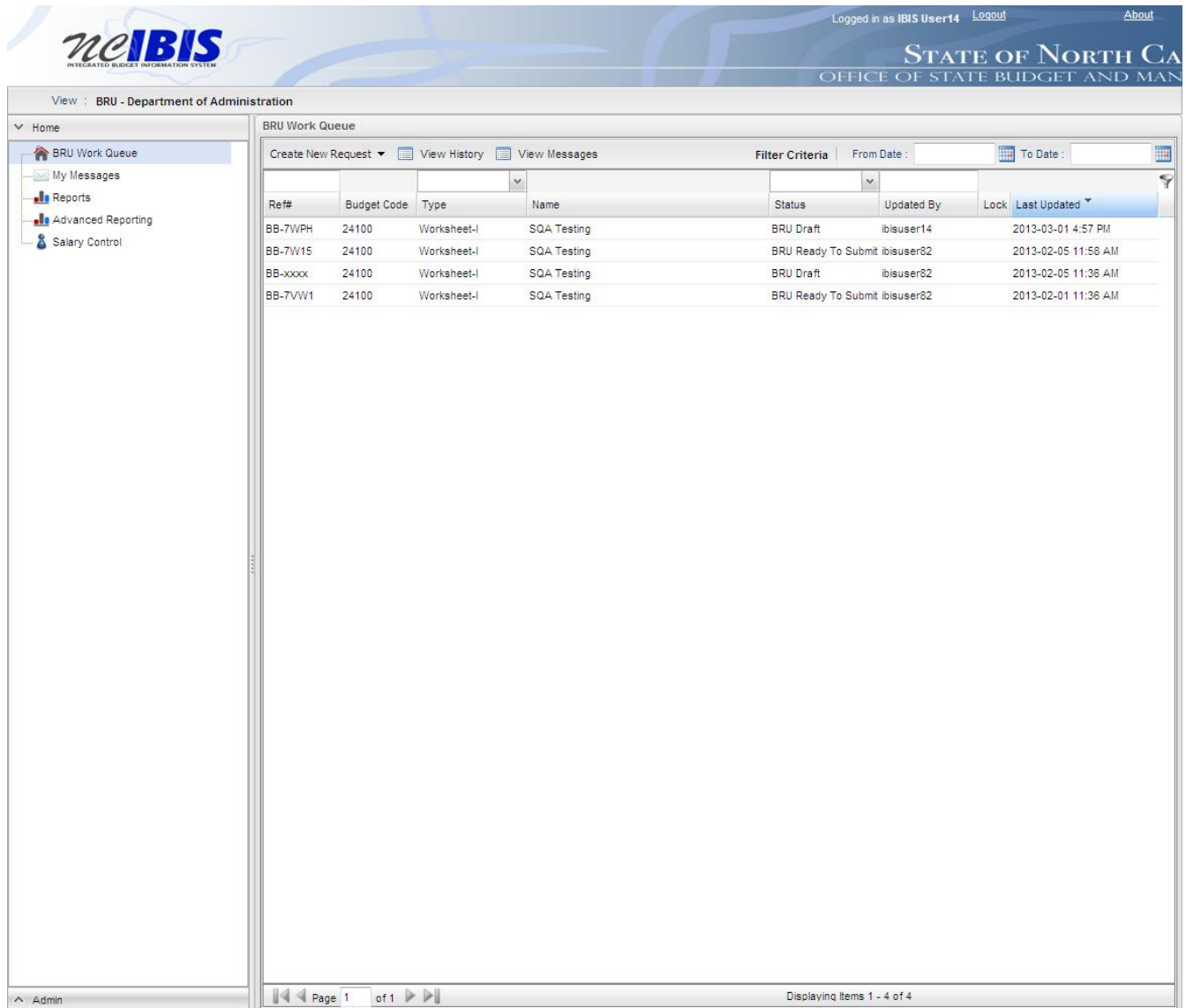
## **BUDGET REVISION – CAPITAL FORM**

## PREFACE

This training guide describes how to use IBIS to complete a budget revision capital form. For policy guidance regarding budget revisions, please consult the [State Budget Manual](#).

## BUDGET REVISION- CAPITAL

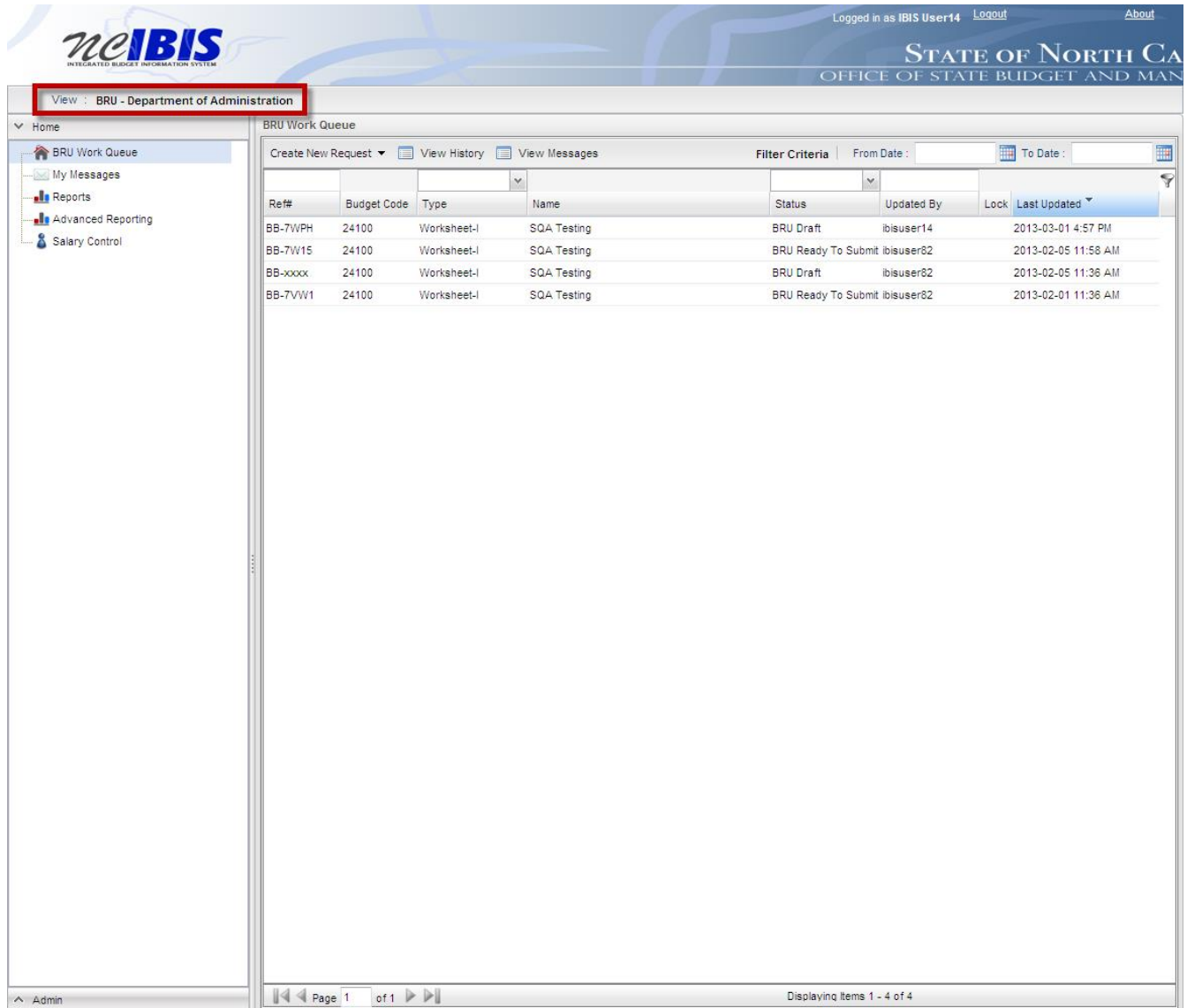
Once you have successfully logged in, you should see the above BRU Work Queue Page as shown below. This could also be an Agency Work Queue or OSBM Work Queue page depending on log-in credentials.



The screenshot shows the neIBIS web application interface. The top header includes the neIBIS logo, the text "STATE OF NORTH CAROLINA OFFICE OF STATE BUDGET AND MANAGEMENT", and user information: "Logged in as IBIS User14", "Logout", and "About". The main content area is titled "BRU Work Queue" and displays a table of budget revision items. The table has columns for Ref#, Budget Code, Type, Name, Status, Updated By, Lock, and Last Updated. The table contains four rows of data. On the left side, there is a navigation menu with links for Home, BRU Work Queue, My Messages, Reports, Advanced Reporting, and Salary Control. At the bottom, there is a pagination bar showing "Page 1 of 1" and "Displaying Items 1 - 4 of 4".

Ref#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
BB-7WPH	24100	Worksheet-I	SQA Testing	BRU Draft	ibisuser14		2013-03-01 4:57 PM
BB-7W15	24100	Worksheet-I	SQA Testing	BRU Ready To Submit	ibisuser82		2013-02-05 11:58 AM
BB-xxxx	24100	Worksheet-I	SQA Testing	BRU Draft	ibisuser82		2013-02-05 11:36 AM
BB-7VW1	24100	Worksheet-I	SQA Testing	BRU Ready To Submit	ibisuser82		2013-02-01 11:36 AM

Find the View indicator in the upper left-hand corner of the page. The field should contain only your BRU. If you have access to multiple departments and/or agencies, those you have access to will appear in a drop-down list in this field for you to select from. In the example below, the user is logged in as the Department of Administration.



neIBIS  
INTEGRATED BUDGET INFORMATION SYSTEM

Logged in as IBIS User14 [Logout](#) [About](#)

STATE OF NORTH CAROLINA  
OFFICE OF STATE BUDGET AND MANAGEMENT

View : BRU - Department of Administration

BRU Work Queue

Create New Request View History View Messages Filter Criteria From Date : To Date :

Ref#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
BB-7WPH	24100	Worksheet-I	SQA Testing	BRU Draft	ibisuser14		2013-03-01 4:57 PM
BB-7W15	24100	Worksheet-I	SQA Testing	BRU Ready To Submit	ibisuser82		2013-02-05 11:58 AM
BB-xxxx	24100	Worksheet-I	SQA Testing	BRU Draft	ibisuser82		2013-02-05 11:36 AM
BB-7VW1	24100	Worksheet-I	SQA Testing	BRU Ready To Submit	ibisuser82		2013-02-01 11:36 AM

Page 1 of 1

Displaying Items 1 - 4 of 4

To create a new budget revision form, click on the Create New Request dropdown list in the middle of the screen.

BRU Work Queue

Create New Request ▾ View History View Messages Filter Criteria From Date : To Date :

Ref#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated ▾
BB-7WPH	24100	Worksheet-I	SQA Testing	BRU Draft	ibisuser14		2013-03-01 4:57 PM
BB-7W15	24100	Worksheet-I	SQA Testing	BRU Ready To Submit	ibisuser82		2013-02-05 11:58 AM
BB-xxxx	24100	Worksheet-I	SQA Testing	BRU Draft	ibisuser82		2013-02-05 11:36 AM
BB-7VW1	24100	Worksheet-I	SQA Testing	BRU Ready To Submit	ibisuser82		2013-02-01 11:36 AM

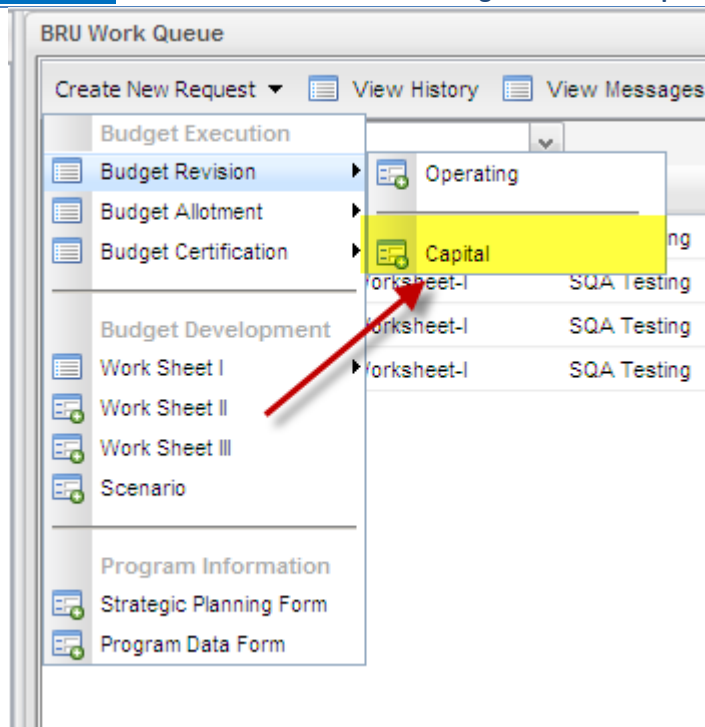
When you click on 'Create New Request', the drop-down will display the following.

BRU Work Queue

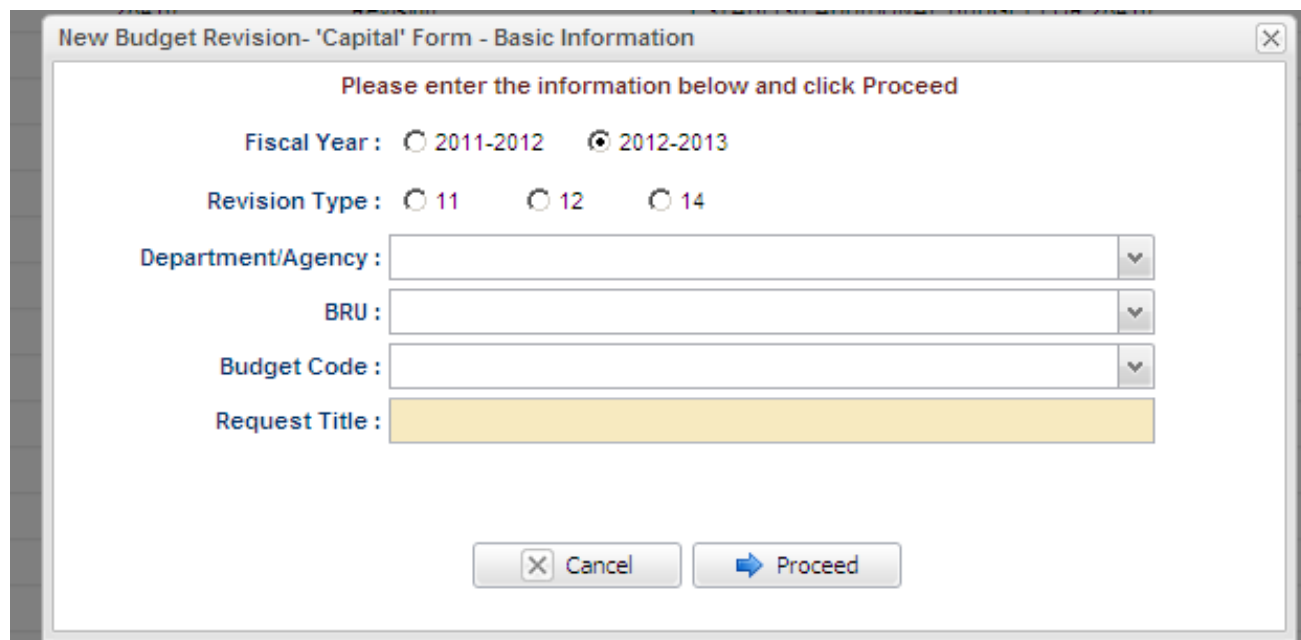
Create New Request ▾ View History View Messages

- Budget Execution
  - Budget Revision
  - Budget Allotment
  - Budget Certification
- Budget Development
  - Work Sheet I
  - Work Sheet II
  - Work Sheet III
  - Scenario
- Program Information
  - Strategic Planning Form
  - Program Data Form

Click on the Budget Revision – Capital option on the menu.



After clicking the operating option, a New Capital Revision Form – Basic Information window will appear as shown in the following screenshot.



The screenshot shows a window titled 'New Budget Revision- 'Capital' Form - Basic Information'. The window contains the following fields and options:

- Fiscal Year :** Radio buttons for 2011-2012 and 2012-2013 (selected).
- Revision Type :** Radio buttons for 11, 12, and 14.
- Department/Agency :** A dropdown menu.
- BRU :** A dropdown menu.
- Budget Code :** A dropdown menu.
- Request Title :** A text input field.

At the bottom of the window, there are two buttons: 'Cancel' and 'Proceed'.

The first field allows you to select the Fiscal Year that is involved in the proposed budget revision. Click on the radio button next to the appropriate fiscal year. Only one year may be selected at a time.

Fiscal Year : ☐ 2011-2012 ☒ 2012-2013

The next field allows you to select the revision type. Click the radio button next to the appropriate revision type. Note that the form allows a user to change between an 11 and 12 but will not allow a type 14 to be changed because it can be approved internally by an agency or BRU user.

Revision Type : ☐ 11 ☐ 12 ☐ 14

Note the next two fields labeled Department/Agency and BRU. In most cases, access will be restricted to a single department/agency so it will default to your Department/Agency and BRU. If a user has access to multiple departments/agencies and BRUs, a dropdown option will appear for selection.



**New Budget Revision 'Capital' Form - Basic Information**

Please enter the information below and click Proceed

Fiscal Year : ☐ 2011-2012 ☒ 2012-2013

Revision Type : ☐ 11 ☐ 12 ☐ 14

Department/Agency : Department of Administration

BRU : Department of Administration

Click on the dropdown arrow for the Budget Code field. This will display a list of valid Capital Budget Codes for the selected Department/Agency and BRU.

**New Budget Revision 'Capital' Form - Basic Information**

Please enter the information below and click Proceed

Fiscal Year : ☒ 2011-2012 ☐ 2012-2013

Revision Type : ☐ 11 ☐ 12 ☐ 14

Department/Agency : Department of Administration

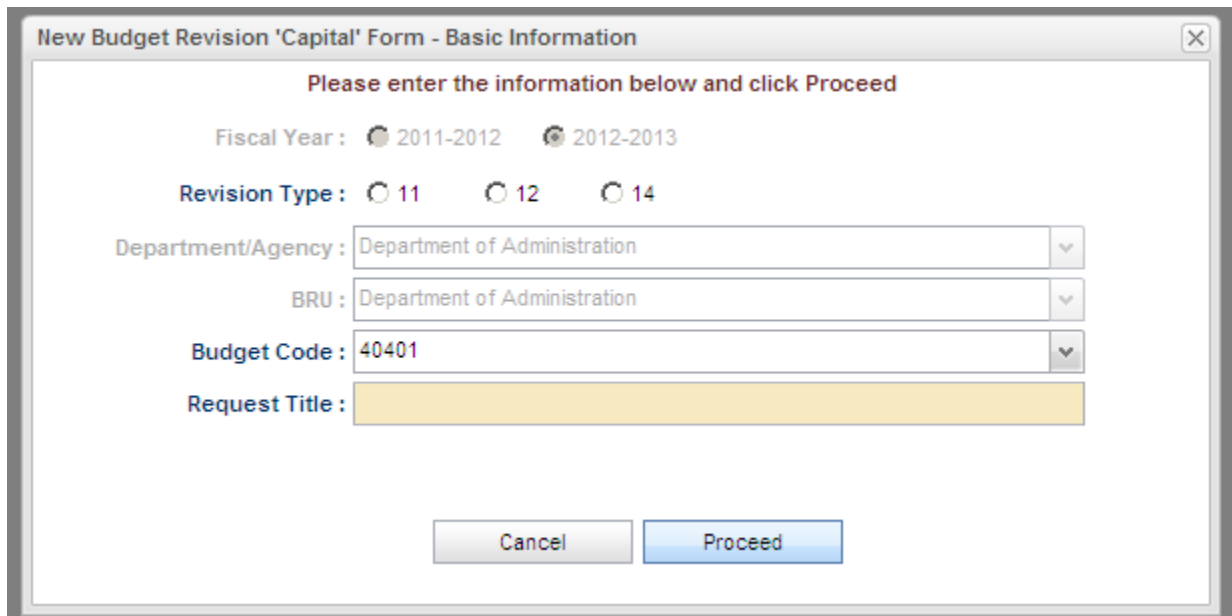
BRU : Department of Administration

Budget Code :

Request Title :

40001	DEPT OF ADMIN CI 2000
40101	DOA - IC 2001 - 2002
40301	Department of Administration-Capital Improvements 2003
40367	Department of Administration - 2003 COPS R&R
40401	DEPARTMENT OF ADMINISTRATION CAPITAL IMPROVEMENT
40467	DEPARTMENT OF ADMINISTRATION - YDC PLANNING LP BOND
40478	DOA-Cops YDC Construction
40501	DEPARTMENT OF ADMINISTRATION CAPITAL IMPROVEMENT
40567	Museum of Art Energy Perf Contr
40568	DWNTOWN GOV'T CMPX ENERGY PERF CONTRACT
40601	DEPARTMENT OF ADMINISTRATION CAPITAL IMPROVEMENT
40670	DOA-COPS Downtown Parking Garage
40701	DEPARTMENT OF ADMINISTRATION CAPITAL IMPROVEMENT
40801	DEPARTMENT OF ADMINISTRATION CAPITAL IMPROVEMENT
40865	AOC Building Purchase

Use the pointer to select the appropriate Budget Code from the list. Once selected, the field becomes populated with the Budget Code selected and the Budget Code list disappears.



**New Budget Revision 'Capital' Form - Basic Information**

Please enter the information below and click Proceed

Fiscal Year : ☒ 2011-2012 ☐ 2012-2013

Revision Type : ☐ 11 ☐ 12 ☐ 14

Department/Agency : Department of Administration

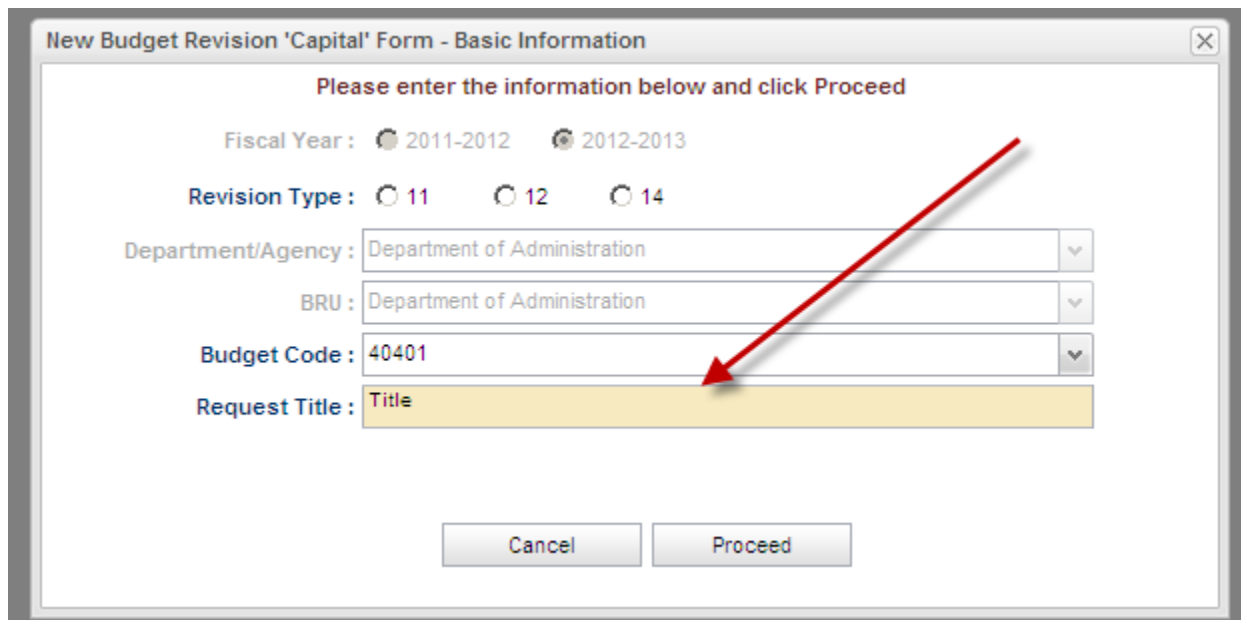
BRU : Department of Administration

Budget Code : 40401

Request Title :

Cancel Proceed

Click in the Request Title field. A flashing cursor will appear in the field. Type a title for the budget revision. As you type, the title will appear in the field as shown below.



**New Budget Revision 'Capital' Form - Basic Information**

Please enter the information below and click Proceed

Fiscal Year : ☒ 2011-2012 ☐ 2012-2013

Revision Type : ☐ 11 ☐ 12 ☐ 14

Department/Agency : Department of Administration

BRU : Department of Administration

Budget Code : 40401

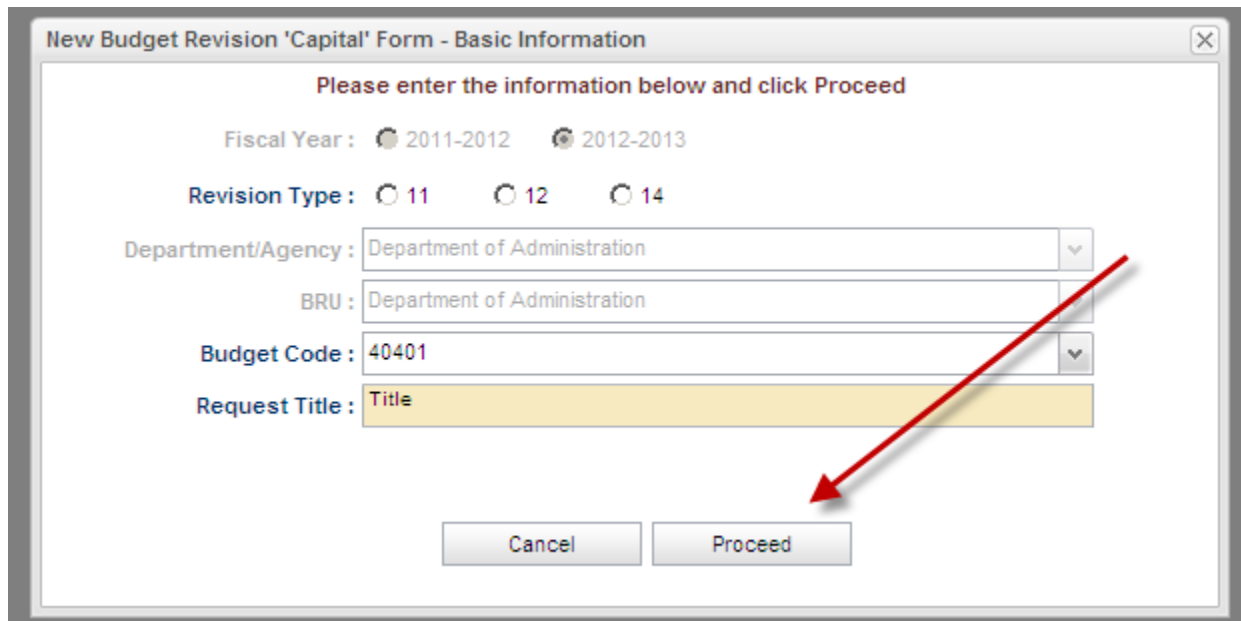
Request Title : Title

Cancel Proceed



Clicking on the Cancel button will close the window. Nothing will be saved and the Work Queue will reappear. If there is no need to cancel the form, bypass this step.

If instead of canceling in the prior step and the entries are satisfactory, click on the Proceed button.



New Budget Revision 'Capital' Form - Basic Information

Please enter the information below and click Proceed

Fiscal Year : ☒ 2011-2012 ☐ 2012-2013

Revision Type : ☐ 11 ☐ 12 ☐ 14

Department/Agency : Department of Administration

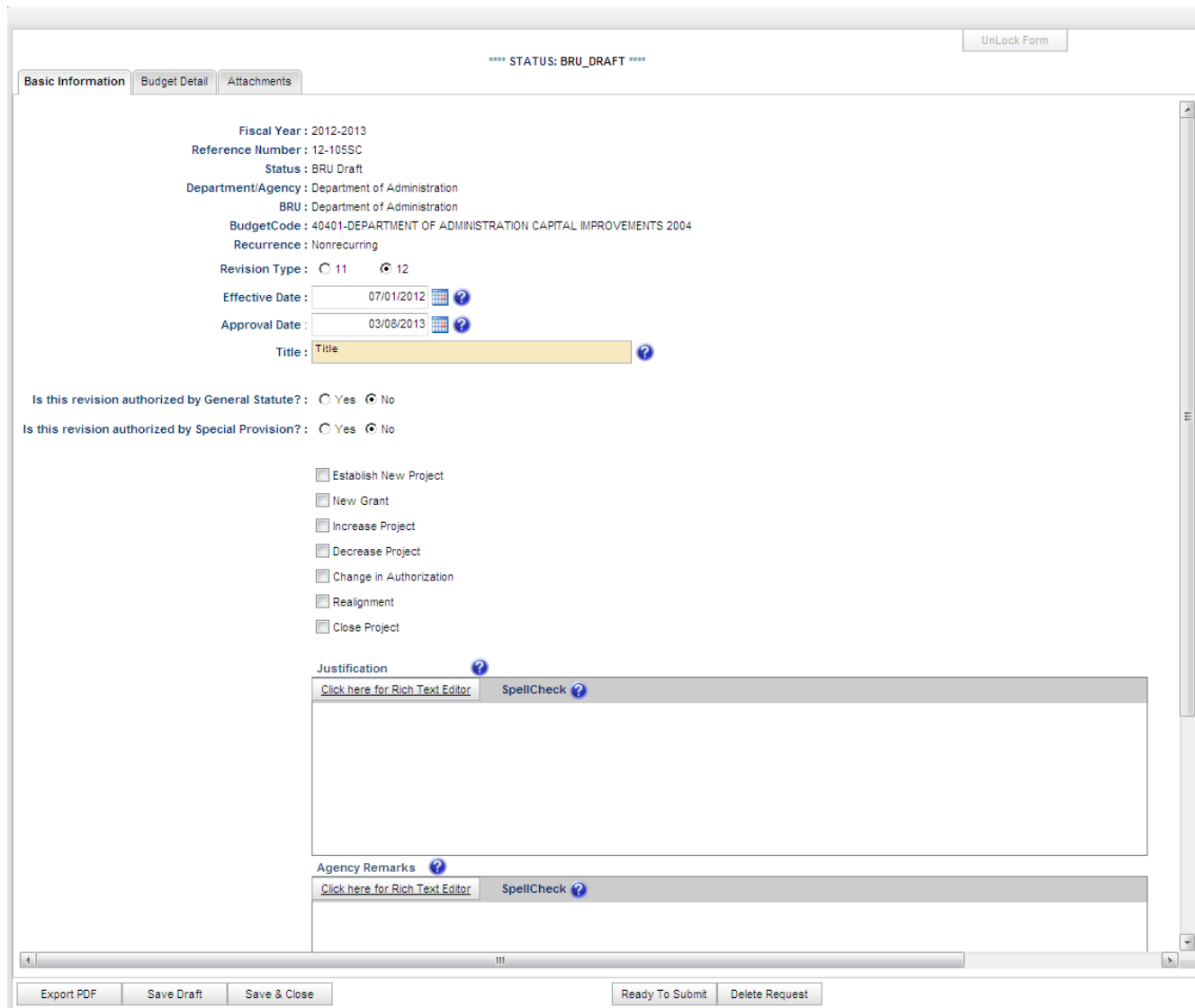
BRU : Department of Administration

Budget Code : 40401

Request Title : Title

Cancel Proceed

A Budget Revision Capital form will open as shown below. Note: The form's three tabs (Basic Information, Budget Detail, and Attachments) will appear in the upper left corner of the screen.



The screenshot displays the 'Basic Information' tab of the Budget Revision Capital form. At the top right, there is a button labeled 'UnLock Form'. Below the tabs, the status is indicated as '\*\*\*\* STATUS: BRU\_DRAFT \*\*\*\*'. The form contains several fields for metadata: Fiscal Year (2012-2013), Reference Number (12-105SC), Status (BRU Draft), Department/Agency (Department of Administration), BRU (Department of Administration), BudgetCode (40401-DEPARTMENT OF ADMINISTRATION CAPITAL IMPROVEMENTS 2004), and Recurrence (Nonrecurring). There are radio buttons for Revision Type (11 and 12), with 12 selected. Effective and Approval dates are shown with calendar icons. A Title field is present with a question mark icon. Below these are two authorization questions: 'Is this revision authorized by General Statute?' and 'Is this revision authorized by Special Provision?', both with 'No' selected. A list of project actions includes 'Establish New Project', 'New Grant', 'Increase Project', 'Decrease Project', 'Change in Authorization', 'Realignment', and 'Close Project'. Two text areas for 'Justification' and 'Agency Remarks' are provided, each with a 'Click here for Rich Text Editor' link and a 'SpellCheck' button. At the bottom, there are buttons for 'Export PDF', 'Save Draft', 'Save & Close', 'Ready To Submit', and 'Delete Request'.

Note: This section will only address the first two tabs. The Attachments tab's functionality is addressed in a different user guide that is available on the [IBIS website](#).

### Basic Information

The Basic Information screen comes to the forefront since it is the default tab when creating a new or opening an existing form.

Verify the information is displayed correctly in the following non-editable fields highlighted in the screenshot above – biennium, fiscal year, reference number, status, department/agency, BRU, and budget code.

**Fiscal Year:** The form will show the Fiscal Year selected in the initiation window.

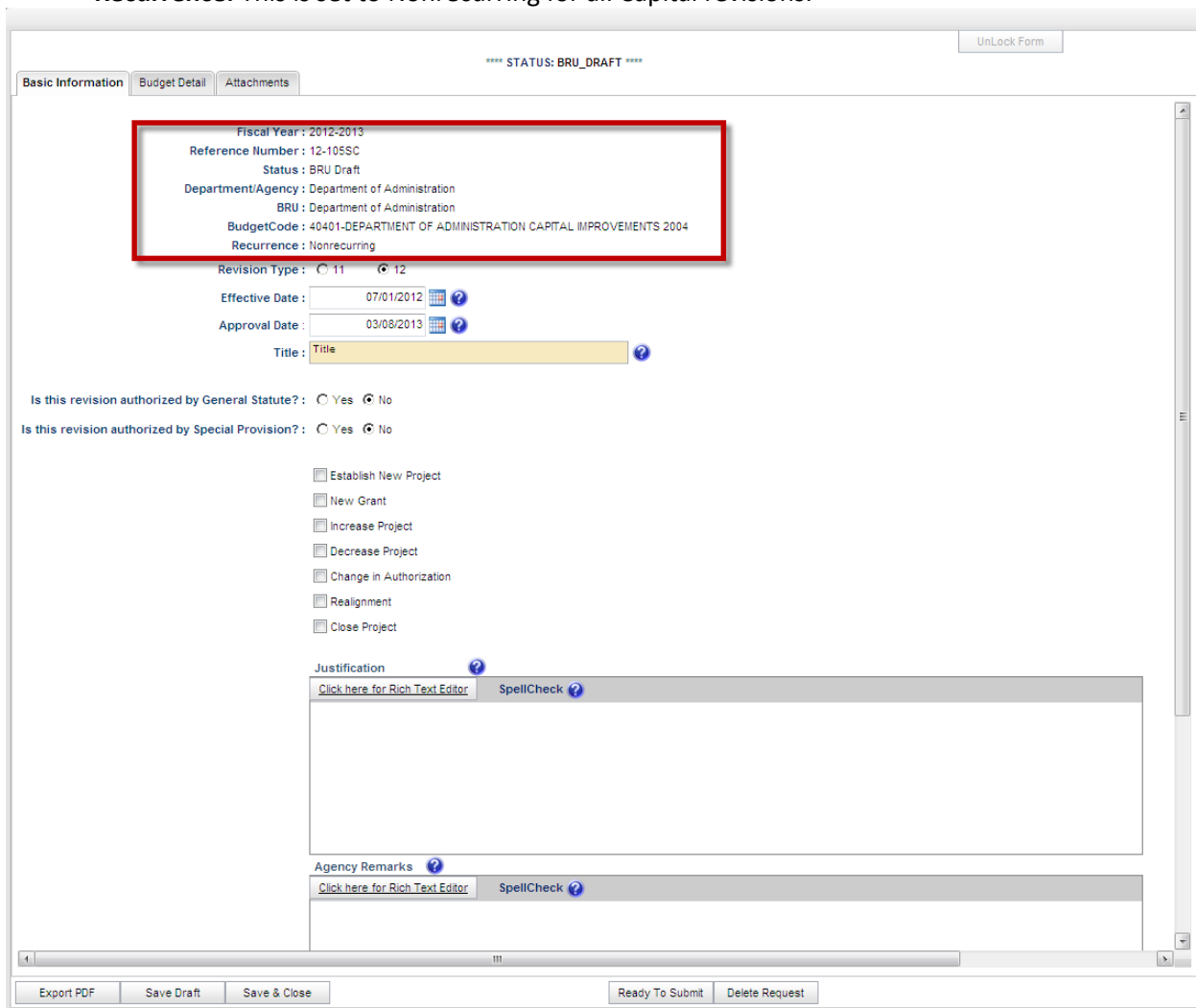
**Reference Number:** The form will show a reference number that begins with the revision type selected when the form was created (11, 12, or 14) followed by four system generated digits.

**Department/Agency:** The Department/Agency that is associated with your IBIS ID.

**BRU:** The BRU associated with your IBIS ID and selected in the initiation window.

**Budget Code:** The Budget Code selected in the initiation window.

**Recurrence:** This is set to Nonrecurring for all Capital revisions.



\*\*\*\* STATUS: BRU\_DRAFT \*\*\*\*

UnLock Form

Basic Information Budget Detail Attachments

Fiscal Year : 2012-2013  
 Reference Number : 12-105SC  
 Status : BRU Draft  
 Department/Agency : Department of Administration  
 BRU : Department of Administration  
 BudgetCode : 40401-DEPARTMENT OF ADMINISTRATION CAPITAL IMPROVEMENTS 2004  
 Recurrence : Nonrecurring

Revision Type : ☐ 11 ☒ 12

Effective Date : 07/01/2012

Approval Date : 03/08/2013

Title : Title

Is this revision authorized by General Statute? : ☐ Yes ☒ No

Is this revision authorized by Special Provision? : ☐ Yes ☒ No

☐ Establish New Project  
☐ New Grant  
☐ Increase Project  
☐ Decrease Project  
☐ Change in Authorization  
☐ Realignment  
☐ Close Project

Justification

Click here for Rich Text Editor SpellCheck

Agency Remarks

Click here for Rich Text Editor SpellCheck

Export PDF Save Draft Save & Close Ready To Submit Delete Request

Review the selection for the revision type field as highlighted below. The form should show the revision type selected when the form was created. The revision type may be changed between an 11 and 12 when either of those types is created. A type 14 cannot be changed to a different type.

\*\*\*\* STATUS: BRU\_DRAFT \*\*\*\*

Basic Information Budget Detail Attachments

Fiscal Year : 2012-2013

Reference Number : 12-105SC

Status : BRU Draft

Department/Agency : Department of Administration

BRU : Department of Administration

BudgetCode : 40401-DEPARTMENT OF ADMINISTRATION CAPITAL IMPROVEMENTS 2004

Recurrence : Nonrecurring

Revision Type : ☐ 11 ☒ 12

Effective Date : 07/01/2012



Approval Date : 03/08/2013



Title : Title


View the Effective and Approval Date fields, which are highlighted below. The Effective Date can be changed by typing in a new date into the field or by selecting a date from calendar after the icon is clicked. The Effective Date defaults to July 1.

The Approval Date will be inactive for type 11s and 12s at the BRU and Agency levels and active for OSBM because approval authority resides at that level. For type 14 budget revisions, this will be an active field for BRUs and Agencies and an approval date is required to be selected prior to approval.


Fiscal Year : 2012-2013  
 Reference Number : 12-105SC  
 Status : BRU Draft  
 Department/Agency : Department of Administration  
 BRU : Department of Administration  
 BudgetCode : 40401-DEPARTMENT OF ADMINISTRATION CAPITAL IMPROVEMENTS 2004  
 Recurrence : Nonrecurring  
 Revision Type : ☐ 11 ☒ 12

Effective Date :   

Approval Date :   

Title :  

If necessary, the title can be changed by clicking in the title field and altering the text.


Title :  

The form defaults to a “no” answer to the question, “Is this revision authorized by General Statute?”

Is this revision authorized by General Statute? : ☐ Yes ☒ No

If appropriate, select “Yes.” If yes is selected, the form creates a required text field where the General Statute reference will be entered.

Is this revision authorized by General Statute? : ☒ Yes ☐ No

 General Statute Reference :

The form defaults to a “No” answer to the question, “Is this revision authorized by Special Provision?”

Is this revision authorized by Special Provision? : ☐ Yes ☒ No

If appropriate, select “Yes.” If yes is selected, the form creates a required text field where the Session Law reference will be entered.

Is this revision authorized by Special Provision? : ☒ Yes ☐ No



Session Law Reference :

Review the budget revision categories, which are shown below.

- ☐ Establish New Project
- ☐ New Grant
- ☐ Increase Project
- ☐ Decrease Project
- ☐ Change in Authorization
- ☐ Realignment
- ☐ Close Project

Check the category that pertains to your budget revision. (Increase Project was selected in the example below.)

- ☐ Establish New Project
- ☐ New Grant
- ☒ Increase Project
- ☐ Decrease Project
- ☐ Change in Authorization
- ☐ Realignment
- ☐ Close Project

Note: Checking “New Project” will display additional dropdowns to collect additional information as shown below.

☒ Establish New Project

*Please provide information in the following required fields.*  
*Note: The amount entered for Original Allocation needs to equal the total requirements entered on the Budget Detail tab.*

Budget Funding Type :

Budget Adjustment Type :


Project Type :

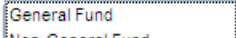
Original Allocation :

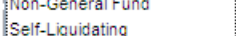
Clicking the dropdown for Budget Funding Type will display four options: General Fund, Non-General Fund, Self-Liquidating, and Special Indebtedness. Select the appropriate option.

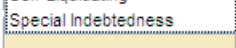
☒ Establish New Project


*Please provide information in the following required fields.*  
*Note: The amount entered for Original Allocation needs to equal the total requirements entered on the Budget Detail tab.*

Budget Funding Type : 

Budget Adjustment Type : 

Project Type : 

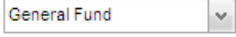
Original Allocation : 




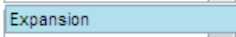
Clicking the dropdown for Budget Adjustment Type will display one option. Select the Expansion option.

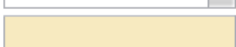
☒ Establish New Project


*Please provide information in the following required fields.*  
*Note: The amount entered for Original Allocation needs to equal the total requirements entered on the Budget Detail tab.*

Budget Funding Type : 

Budget Adjustment Type : 

Project Type : 

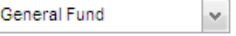
Original Allocation : 





Clicking the dropdown for Project Type will display three options: New Project, Existing, Repair and Renovation Reserve. Select the appropriate option.


☒ Establish New Project

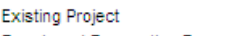
*Please provide information in the following required fields.*  
*Note: The amount entered for Original Allocation needs to equal the total requirements entered on the Budget Detail tab.*


Budget Funding Type : 

Budget Adjustment Type : 

Project Type : 

Original Allocation : 





Clicking in the Original Allocation field will turn the background of the field to white, which indicates text can be entered. Type the appropriate amount in the field.

☒ Establish New Project

*Please provide information in the following required fields.  
Note: The amount entered for Original Allocation needs to equal the total requirements entered on the Budget Detail tab.*

Budget Funding Type : General Fund ▼

Budget Adjustment Type : Expansion ▼

Project Type : New Project ▼

Original Allocation :



If Establishing New Project is not the correct choice, uncheck the box and these additional fields will disappear.

Click in the Justification box and enter an explanation of the budget revision within the field. This is a required field on the budget revision form.

Justification ?

[Click here for Rich Text Editor](#) SpellCheck ?

Enter a budget revision justification here.



The Rich Text Editor can be clicked to format the text or to enter text.

Justification ?

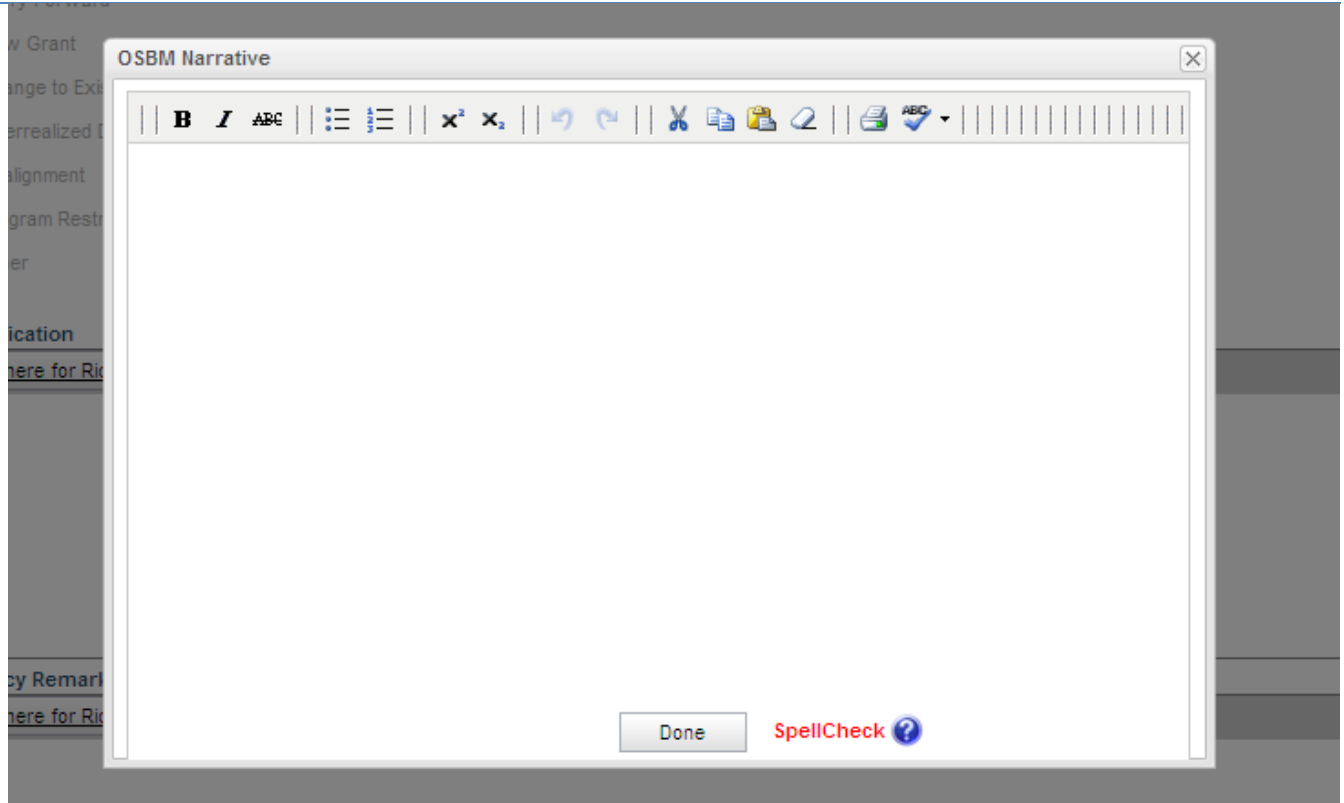
[Click here for Rich Text Editor](#) SpellCheck ?

Enter a budget revision justification here.



By clicking the Rich Text Editor, a window will come up as shown below where text entered in the justification field can be edited or where a justification can be entered. Additional formatting options are available beyond those displayed on the screen by using shortcuts such as "Control + U".





The screenshot shows a window titled "OSBM Narrative" with a close button (X) in the top right corner. The window contains a rich text editor with a toolbar at the top. The toolbar includes buttons for bold (B), italic (I), text color (ABC), bulleted list, numbered list, decrease indent, increase indent, undo, redo, cut, copy, paste, and a dropdown menu with "ABC" and a question mark. Below the toolbar is a large, empty text area. At the bottom of the window, there are two buttons: "Done" and "SpellCheck" with a question mark icon.

Click in the Agency Remarks box and enter text if desired. This is an optional field on the budget revision form. Agency remarks is only editable and seen by BRU or Agency users.



The screenshot shows a section titled "Agency Remarks" with a question mark icon. Below the title is a button labeled "Click here for Rich Text Editor" and a "SpellCheck" button with a question mark icon. Below these buttons is a large, empty text area. The text "Agency remarks is an optional field." is visible at the top of the text area.

OSBM Remarks is enabled only for OSBM users and is an optional field. Once text is entered by OSBM, it can be viewed but not edited by Agency and BRU users.

OSBM Remarks ?

SpellCheck ?

Enter the appropriate information in the justification and remark fields and click on the Budget Detail tab. Once clicked, the Budget Detail tab will come to the forefront as shown below.

UnLock Form

\*\*\*\* STATUS: OSBM\_DRAFT \*\*\*\*

Basic Information Budget Detail Attachments

Screen ID : BRO-2  
IBIS ID : A65A

**Requirements ?**

Edit Row Remove Row(s) Sort Rows Cancel Edit Validation Messages

Fund#	CC#	Account#	Y1 Amt	Add	
Fund Code ^ 1	Cost Center ^ 2	Account Number ^ 3	Account Description	Amount (2012-13)	Authorized Budget (2012-13)
No items to show.					

**Receipts ?**

Edit Row Remove Row(s) Sort Rows Cancel Edit

Fund#	CC#	Account#	Y1 Amt	Add	
Fund Code ^ 1	Cost Center ^ 2	Account Number ^ 3	Account Description	Amount (2012-13)	Authorized Budget (2012-13)
No items to show.					

**Summary ?**

	2012-13
Total Requirements	\$0.00
Total Receipts	\$0.00
Appropriation	\$0.00

**Transfer to/from: ?**


Edit Row Remove Row(s) Cancel Edit


Budget Code	Y1 Amt	Reference	Add
4			




Export PDF Save Draft Save & Close Validate Return To BRU Delete Request

In the Requirements and Receipts sections, there are four buttons that appear first: Edit Row, Remove Row(s), Sort Rows and Cancel Edit. These functions are only utilized when rows have been entered into the form so the data entry function will be explained first. Then these buttons will be explained.

To add a row of data for a requirement on the budget revision form, focus on the data entry row directly below the buttons mentioned above. The fields in this row are editable, and when the end of the row is reached, the Add button will save this data so that another row can be entered.

**Requirements** 

Edit Row Remove Row(s) Sort Rows Cancel Edit  Validation Messages

Fund#	CC#	Account#		Y1 Amt		Add
Fund Code  1	Cost Center  2	Account Number  3	Account Description	Amount (2012-13)	Authorized Budget (2012-13)	

No items to show.

The Fund field contains a dropdown list that displays fund codes available for the budget code associated with the budget revision being created.

**Requirements?**

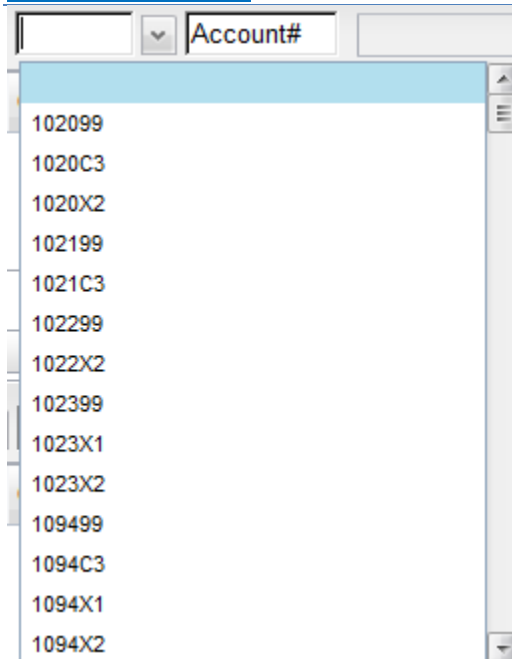
Edit Row Remove Row(s) Sort Rows

Fund#	CC#	Account#
4401	CAPITOL SQ ELECTRICAL	
4402	ARCHIVES & HISTORY BLDG	
4403	SALISBURY ST PED BRIDGE	
4404	NEW EDUC HVAC COMPUTER	
4405	COOPER BLDG ELEVATOR REP	
4406	REPAIRS & WATERPROOFING	
4407	HALIFAX MALL R&R	
4408	SIDEWALK REPAIRS - GOV'T	
4409	SEABOARD BLDG EXTERIOR	
4410	OCRACOCK ISLAND PHASE 2	
4411	LABOR - 2004 R&R FUNDS	
4412	DPI - 2004 R&R FUNDS	
4413	REV - 2004 R&R FUNDS	
4414	STATE LAND FUND	
4415	VET CEMETERY JACKSONVILL	

Select the fund from the list for the budget revision form being created. The selected fund will populate the field and the dropdown list will disappear. The fund code can also be typed in manually.

4414

Cost Center is an optional field and the Cost Center dropdown list will only display values if the Department/Agency uses Cost Centers. This field can be bypassed if desired because the form defaults to a blank cost center as highlighted below.




A screenshot of a web application interface showing a dropdown menu for 'Account#'. The dropdown is open, displaying a list of account codes. The first item, '102099', is highlighted in light blue. The list includes various codes such as '1020C3', '1020X2', '102199', '1021C3', '102299', '1022X2', '102399', '1023X1', '1023X2', '109499', '1094C3', '1094X1', and '1094X2'. The dropdown has a small arrow icon at the top and a scroll bar on the right side.

Account#
102099
1020C3
1020X2
102199
1021C3
102299
1022X2
102399
1023X1
1023X2
109499
1094C3
1094X1
1094X2

If necessary, select the desired Cost Center from the dropdown list. It will populate the field and the dropdown list will disappear. The Cost Center can also be typed in manually.

The Account field will present a list of accounts once the user has entered three digits into the field as shown below. Accounts are numerous so the system allows you to narrow the list down by entering the first few digits, or the full account code can be entered manually in the field.

**Requirements?**

Edit Row Remove Row(s) Sort Rows Cancel Edit  Validation Messages

4414 CC# 537 Y1 Amt

Fund Code <sup>1</sup> Cost Center <sup>2</sup>

537010 RESERVE-CI PROJECTS  
537101 RESV-SALARY & F. B.  
537102 RESERVES  
537103 RESV AQUARIUM SUPPORT  
537104 RESV FAC COND ASSESS TEAM  
537105 RESV MLK COMMISSION  
537106 RESV DISPARITY STUDY  
537107 RESV DISPLACED HOMEMAKERS  
537108 RESV-CENTRAL MAIL CENTER  
537109 RES GPAC PERSONNEL REFORM  
537110 RESV SHP PUR ALLIANCE BD  
537111 RESV-HURRICANE FLOYD  
537112 RESV-E-COMMERCE INITIATIV  
537113 RESERVE MGMT FLEX REDUCTI  
537114 RESERVE ETHICS FLEX REDUC

**Receipts?**

Edit Row Remove Row(s) So

Fund# CC#

Fund Code <sup>1</sup> Cost Center <sup>2</sup>

NO ITEMS TO SHOW.

Select the desired account from the list or type in the account number manually. It will populate the field and the dropdown list will disappear. By selecting/entering the Account number, the associated Account description will also populate the adjacent field.

4414 CC# 537010 RESERVE-CI PRO

The next field in the Add/Edit Row area is the Year 1 amount field (Y1 Amt). Year 1 and Year 2 amount fields.

Y1 Amt

Enter an amount in the field as appropriate. The value will reformat to dollars when you click Add to finish the row entry. Be aware that amounts may be entered as either positive or negative amounts.

Once amounts are entered, the current authorized budget will be displayed for the fund, cost center, and account combination as highlighted below.

4414 CC# 537010 RESERVE-CI PRO... 23 \$0

When all data has been entered for a row, click on the Add button. The row will move down to the grid below, and the majority of the Add/Edit row will clear.

Add as many rows of requirements as appropriate to complete the budget revision form. Once the first row is added, the fund code and cost center codes will pre-populate with the choices made when entering that first row to help quicken the entry of subsequent rows. If these values are not appropriate for subsequent row(s), they can be overwritten.

**Requirements** ?

Edit Row Remove Row(s) Sort Rows Cancel Edit Validation Messages

Fund Code ^ 1	Cost Center ^ 2	Account Number ^ 3	Account Description	Amount (2012-13)	Authorized Budget (2012-13)
4414		537010	RESERVE-CI PROJECTS	\$25,000.00	\$0.00

The Add/Edit Row(s) functionality for Receipts is identical to the Requirements functionality and therefore each step will not be replicated here.

**Receipts** ?

Edit Row Remove Row(s) Sort Rows Cancel Edit

Fund#	CC#	Account#	Y1 Amt	Add	
Fund Code ^ 1	Cost Center ^ 2	Account Number ^ 3	Account Description	Amount (2012-13)	Authorized Budget (2012-13)
No items to show.					

To edit a row that has been entered (in either Requirements or Receipts), click on a row to highlight it.

**Requirements** ?

Edit Row Remove Row(s) Sort Rows Cancel Edit Validation Messages

Fund Code ^ 1	Cost Center ^ 2	Account Number ^ 3	Account Description	Amount (2012-13)	Authorized Budget (2012-13)
4414		534320	BUILDINGS CONSTRUCTED	\$25,000.00	\$0.00
4414		537010	RESERVE-CI PROJECTS	(\$25,000.00)	\$0.00

Click on the Edit Row button and the data in the selected row will populate the Edit/Add row line at the top of the grid.

**Requirements?**

Edit Row Remove Row(s) Sort Rows Cancel Edit Validation Messages

4414		534320	BUILDINGS CONS...	25000	\$0	Update
Fund Code ^ 1	Cost Center ^ 2	Account Number ^ 3	Account Description	Amount (2012-13)	Authorized Budget (2012-13)	
4414		534320	BUILDINGS CONSTRUCTED	\$25,000.00	\$0.00	
4414		537010	RESERVE-CI PROJECTS	(\$25,000.00)	\$0.00	

When a row has been selected for edit, the previously entered data may be changed. The Update button at the end of the row must be clicked to save changes.

**Requirements?**

Edit Row Remove Row(s) Sort Rows Cancel Edit Validation Messages

4414		534320	BUILDINGS CONS...	25000	\$0	Update
Fund Code ^ 1	Cost Center ^ 2	Account Number ^ 3	Account Description	Amount (2012-13)	Authorized Budget (2012-13)	
4414		534320	BUILDINGS CONSTRUCTED	\$25,000.00	\$0.00	
4414		537010	RESERVE-CI PROJECTS	(\$25,000.00)	\$0.00	

Once Update has been clicked, the add/update row will clear (except for the fund code and cost center fields) and the updated data will show in the grid below the data entry row.

To delete a row that has been entered, click on a row to highlight it.

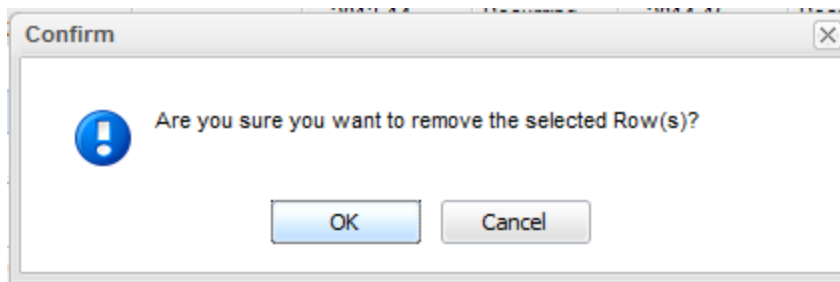
**Requirements?**

Edit Row Remove Row(s) Sort Rows Cancel Edit Validation Messages

4414		534320	BUILDINGS CONS...	25000	\$0	Update
Fund Code ^ 1	Cost Center ^ 2	Account Number ^ 3	Account Description	Amount (2012-13)	Authorized Budget (2012-13)	
4414		534320	BUILDINGS CONSTRUCTED	\$25,000.00	\$0.00	
4414		537010	RESERVE-CI PROJECTS	(\$25,000.00)	\$0.00	



Click on the Remove Row(s) button and a confirm deletion message box will appear.



To cancel the deletion, click the Cancel button. To complete the deletion, click the OK button.

To Sort the rows that you have entered, click the Sort Rows button.

Requirements ?

Edit Row Remove Row(s) **Sort Rows** Cancel Edit Validation Messages

4414		534320	BUILDINGS CONS...	25000	\$0	Update
Fund Code ^ 1	Cost Center ^ 2	Account Number ^ 3	Account Description	Amount (2012-13)	Authorized Budget (2012-13)	
4414		534320	BUILDINGS CONSTRUCTED	\$25,000.00	\$0.00	
4414		537010	RESERVE-CI PROJECTS	(\$25,000.00)	\$0.00	

The rows will sort in Fund Code, Cost Center, Account Number order, ascending. Click a second time and they will resort in descending order.

Note: There is also a built-in sort for Fund Code, Cost Center, Account Number, Account Description, Position Number, and Classification that will sort ascending or descending when the column header is clicked.

If a row has been selected for edit by highlighting and clicking the Edit Row but then no edit is necessary, click the Cancel Edit to clear the Add/Edit row and to return the selected row to the grid without changes.

Requirements ?

Edit Row Remove Row(s) Sort Rows **Cancel Edit** Validation Messages

4414		534320	BUILDINGS CONS...	25000	\$0	Update
Fund Code ^ 1	Cost Center ^ 2	Account Number ^ 3	Account Description	Amount (2012-13)	Authorized Budget (2012-13)	
4414		534320	BUILDINGS CONSTRUCTED	\$25,000.00	\$0.00	
4414		537010	RESERVE-CI PROJECTS	(\$25,000.00)	\$0.00	

When Requirements and/or Receipts entries are entered into the budget revision form, the data populates the Summary table at the bottom of the Budget Detail tab. The Summary table will add all Requirements and Receipts entered in this form and calculate the Appropriation amount.

**Summary** ?

	2012-13
Total Requirements	\$0.00
Total Receipts	\$0.00
Appropriation	\$0.00

The transfer to/from section of a budget revision is required for any revision that increases or decreases appropriation. If appropriate for a budget revision, click the dropdown arrow for the budget code field under the Transfer to/from section.

**Transfer to/from:** ?

Edit Row Remove Row(s) Cancel Edit

Budget Code Y1 Amt 12 - Reference# Add

Budget Code	Amount (2012-13)	Revision Type	Revision Number
No items to show.			
Total Appropriation Transfer:		\$0.00	

Enter at least the first two digits of a budget code and a list of all budget codes that begin with those digits will appear. The budget code can also be typed in manually.

Budget Code	Name
40001	DEPT OF ADMIN CI 2000
40002	OSBPM CI 2000
40006	OSBPM-CI 2000-PROJ RESERVE
40007	CRIME CONTROL-CI 2000
40008	DOT-CI 2000
40009	WILDLIFE RESOURCES COMMISSION
40010	NC STATE PORTS AUTH.-CI 2000
40011	GENERAL ASSEMBLY-CI 2000
40012	UNC - GA, C.I. 2000
40013	CORRECTION-CI 2000
40014	CULT.RES.-CI 2000
40015	JUSTICE-CI 2000
40016	DENR -CI 2000
40017	DACS-CI 2000
40018	COMMERCE-CI 2000
40019	NCSSM CAPITAL IMPROV. 2000
40020	COMMUN. SERV. CI 2000

Select the appropriate budget from the list. Alternatively, a budget code can be manually entered in the field.

**Transfer to/from:** ?

Edit Row Remove Row(s) Cancel Edit

40001	Y1 Amt	12 -	Reference#	Add
Budget Code	Amount (2012-13)	Revision Type	Revision Number	

Click in the Y1 Amt field and enter the amount being transferred to/from the selected/entered budget code.

**Transfer to/from:** ?

Edit Row Remove Row(s) Cancel Edit

40001	-25000	12 -	Reference#	Add
Budget Code	Amount (2012-13)	Revision Type	Revision Number	

Click on the dropdown arrow next to the Reference# field. You will see a list of current month budget revisions that are the same type as the budget revision form you are completing. The Transfer to/from is restricted to current month revisions and by type. An entry should be made for transfers involving statewide reserve budget codes (19xxx) but no revision number needs to be selected.

**Transfer to/from:** ?

Edit Row Remove Row(s) Cancel Edit

40001	-25000	12 -	Reference#	Add
Budget Code	Amount (2012-13)	Revision Type	Revision Number	

Select a revision from the list.

When you have completed the new row, click on the Add button. The row will move down to the grid below.



Add additional rows to the table if appropriation is being transferred from multiple budget codes and through multiple revisions.

The Edit Row, Remove Row(s), and Cancel Edit features work the same as the Requirement/Receipts table and will not be explained here. For assistance, refer to those functions described in previous sections of this document.

At the bottom of the form there are form action buttons that are available while working on every tab in the form. The buttons are Export PDF, Save Draft, Save & Close, Ready to Submit and Delete Request. Usage of these buttons is standard within the IBIS application and their functionality is covered in the "Standard Form buttons" training document found on the [IBIS website](#).